

HOW TO: Request a Change of Circumstance Loan Estimate (LE

Step 1: Access the loan from your Pipeline View, and click on "Change of Circumstance" under Loan Actions.

NOTE: If your loan is locked, ensure any changes that would affect (or you had to enter to obtain) pricing has been updated. You can make changes to your Rate by accessing Product & Pricing. Then click "Change Request".

i⊟ LOAN SUMMARY	Vour loan is locked in Optimal Blue. Changes to 1003 are not permitted at this time	×
1003	Product, Pricing & Change Request	÷
	Lock	
	Ourrent Lock Status	
🎄 CONDITIONS	Product & Lock Details	
(\$) FEES	Towne FNMA Conforming 30 Yr Fixed	

Step 2: Select "Change of Circumstance" under Loan Actions.

Step 3: Complete the Change of Circumstance screen:

- Choose a Changed Circumstance from the dropdown
- List all changes in the comments section
- Select all disclosure reasons that apply.
- Step 4: Click "Request Change".

	Borrower Information			
	Select Borr ver Pair	Darcy 🔻		
Seconditions				
\$) FEES	Changed Circumstanc	æ		
OAN ACTIONS	Request Status	Not Sent		
	* Changed Circumstance	Loan amount has changed	· /	
nport Additional Data Order / Reissue Credit		Loan amount decreased to 275.00 and Rate is		
Order DU		now locked. Discount points: 1%		
Order LPA				
Disclosures	Disclosure Reasons	Changed Circumstance - Settlement Charge Changed Circumstance - Eligibility	es	
ubmit Loan		Revision requested by the Consumer		
Re-Submit Loan		Interest Rate dependant changed (Rate Lo	ck) (10 business davs)	
nange of Circumstance		Delayed Settlement on Construction Loans Other	;	
	Borrower		Co-Borrower	
	Borrower First Name	Mr.	Co-Borrower First Name	
	Borrower Middle Name		Co-Borrower Middle Name	

Encompass How To – Change of Circumstance LE

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